

# 2020-2021 Institutional Verification Form for an Independent Student

Lock Haven University Financial Aid Office

223 Ulmer Hall, Lock Haven, PA 17745

PH: (570) 484-2424

Your 2020–2021 Free Application for Federal Student Aid (FAFSA) was selected for a process called Verification.

- Verification is **required** by the US Department of Education to confirm that the information on your FAFSA was reported correctly.
- Return this form and any other requested items within **30 days**.
- No federal aid will process until this review is complete.
- **If you haven't already done so, use the IRS Data Retrieval Tool (DRT) on the FAFSA to directly link your 2018 IRS tax return information.**
- If you are unable to use the IRS DRT, you will need to provide an IRS tax return transcript for 2018, or a **signed** photocopy of your 2018 federal tax form 1040 including schedules 1, 2 and 3 (if applicable).

## A. Student's Information

Name:			
Date of Birth:	Phone Number:	Email Address:	LHU ID #:
Address:			

## B. Student's Marital Status

Please check one:  Single  Married/Remarried (Date: \_\_\_\_\_)  Divorced/Separated/Widowed (Date: \_\_\_\_\_)

## C. Household Members

Please list the people in the **student's household** including:

- The **student**.
- The student's **spouse**, if married.
- The **student's children**, if the student will provide more than half of their support from July 1, 2020 through June 30, 2021.
- **Other people**, if they now live with the student, and the student provides more than half of their support, and will continue to provide more than half of their support through June 30, 2021.
- **For listed household member(s)**, indicate if the person will be enrolled at least half time in a degree, diploma or certificate program at an eligible postsecondary institution any time between July 1, 2020 and June 30, 2021.

Full Name	Age	Relationship (spouse, child, stepchild)	College Name Write the full name of the college, if applicable	Will be Enrolled at Least Half Time (6 credits or more)	
		<b>Student</b>	<b>Lock Haven University</b>	Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No

If more space is needed, provide a separate page with the student's name and LHU ID # at the top.

### ***D. Student 2018 IRS Income Tax Return Information***

Please check **one** of the four options below:

- 2018 Tax Return Filed/ Used DRT:** The student filed a 2018 federal tax return, and transferred their 2018 IRS Income Tax Return information to the FAFSA using the [IRS Data Retrieval Tool](#).
- 2018 Tax Return Filed/ Tax Return Transcript or Federal Tax Return:** The student filed a 2018 federal tax return, and is including a [2018 IRS Tax Return Transcript](#) or **signed** copy of their [2018 federal tax form 1040 including schedules 1, 2 and 3 \(if applicable\)](#).
- No 2018 Tax Return Filed/ Student Employed:** The student was employed in 2018 but was not required to file a 2018 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS and copies of [all relevant 2018 w-2\(s\)](#).
- No 2018 Tax Return Filed/ Student Not Employed:** The student was not employed in 2018 and was not required to file a 2018 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS.

### ***E. Spouse (if applicable) 2018 IRS Income Tax Return Information***

Please check **one** of the four options below for the spouse:

- 2018 Tax Return Filed/ Used DRT:** The spouse filed a 2018 federal tax return, and transferred their 2018 IRS Income Tax Return information to the FAFSA using the [IRS Data Retrieval Tool](#).
- 2018 Tax Return Filed/ Tax Return Transcript or Federal Tax Return:** The spouse filed a 2018 federal tax return, and is including a [2018 IRS Tax Return Transcript](#) or **signed** copy of their [2018 federal tax form 1040 including schedules 1, 2 and 3 \(if applicable\)](#).
- No 2018 Tax Return Filed/ Spouse Employed:** The spouse was employed in 2018 but was not required to file a 2018 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS and copies of [all relevant 2018 w-2\(s\)](#).
- No 2018 Tax Return Filed/ Spouse Not Employed:** The spouse was not employed in 2018 and was not required to file a 2018 federal tax return. They are providing a **\*\*Verification of Non-Filing Letter** from the IRS.

**Important Note: Notify the financial aid office if you and your spouse filed separate IRS income tax returns for 2018, or had a change in marital status after filing the 2018 taxes.**

#### **\*\*Verification of Non-Filing Letter:**

This is a document obtained from the IRS to verify that the student, and spouse (if applicable), did not file a tax return in 2018. This letter must be dated 10/01/19 or later.

- Go to [www.irs.gov](http://www.irs.gov) and click on "Get Your Tax Record", or submit IRS Form 4506-T. Upon receipt, forward document to LHU Financial Aid Office.

### ***F. Certifications and Signatures***

Each person signing below certifies that all of the information reported is complete and correct. **Intentionally providing inaccurate information may be punishable by law.** The student and spouse (if applicable) must sign and date.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date